PEOPLECLICK USER GUIDE

APPROVAL WORKFLOW

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APPROVING REQUISITIONS

Peopleclick is the University of Calgary's recruitment management system. This system enables us to manage our postings, applicants and approval processes. When a Department/Faculty receives a request to post a position, the information is entered into Peopleclick (including the chain of approval needed). The posting then requires the appropriate approvals before it is processed and posted on the website.

HOW TO APPROVE A REQUISITION

Once you receive a notification email to review and approve a requisition, you must sign into Peopleclick to approve or deny / reject the requisition.

ACCESSING PEOPLECLICK - CONFIGURING YOUR BROWSER SETTINGS FOR PEOPLECLICK

The Peopleclick RMS Recruiting Portal is a web-based application. While you do not need to install any Peopleclick software on your computer to use the Recruiting Portal, you do need to install an approved version of the **Microsoft Internet Explorer** browser (version 7 or 8) and configure it correctly in order to use all of the functions of the Recruiting Portal.

TIPS FOR USERS OF NON-INTERNET EXPLORER BROWSERS

- If you are a PC user and have selected a different browser as your default (e.g., Firefox), you can access Peopleclick by opening Internet Explorer from your desktop and going to https://home.peopleclick.com. If Internet Explorer 7 or 8 is not installed on your PC, you can download it from http://microsoft.com.

- Mac users have the option of accessing the **U of C Virtual Desktop** which will allow you to use Internet Explorer on your computer. For instructions, please visit http://www.ucalgary.ca/hr/administrators/recruitment and click on Accessing Peopleclick on a Mac OSX.

  Note: You must be on campus to access the Virtual Desktop

- If you are a Linux or Sun Microsystems user, there are alternatives:

  a. There are often labs and /or PCs available for use by students/staff. Inquire in your department/unit as to where you may be able to access a PC.
  b. Contact your HR Services team to inform them you are unable to access Peopleclick. They will provide any details you require regarding the requisition and will request that you submit an email with your approval decision.

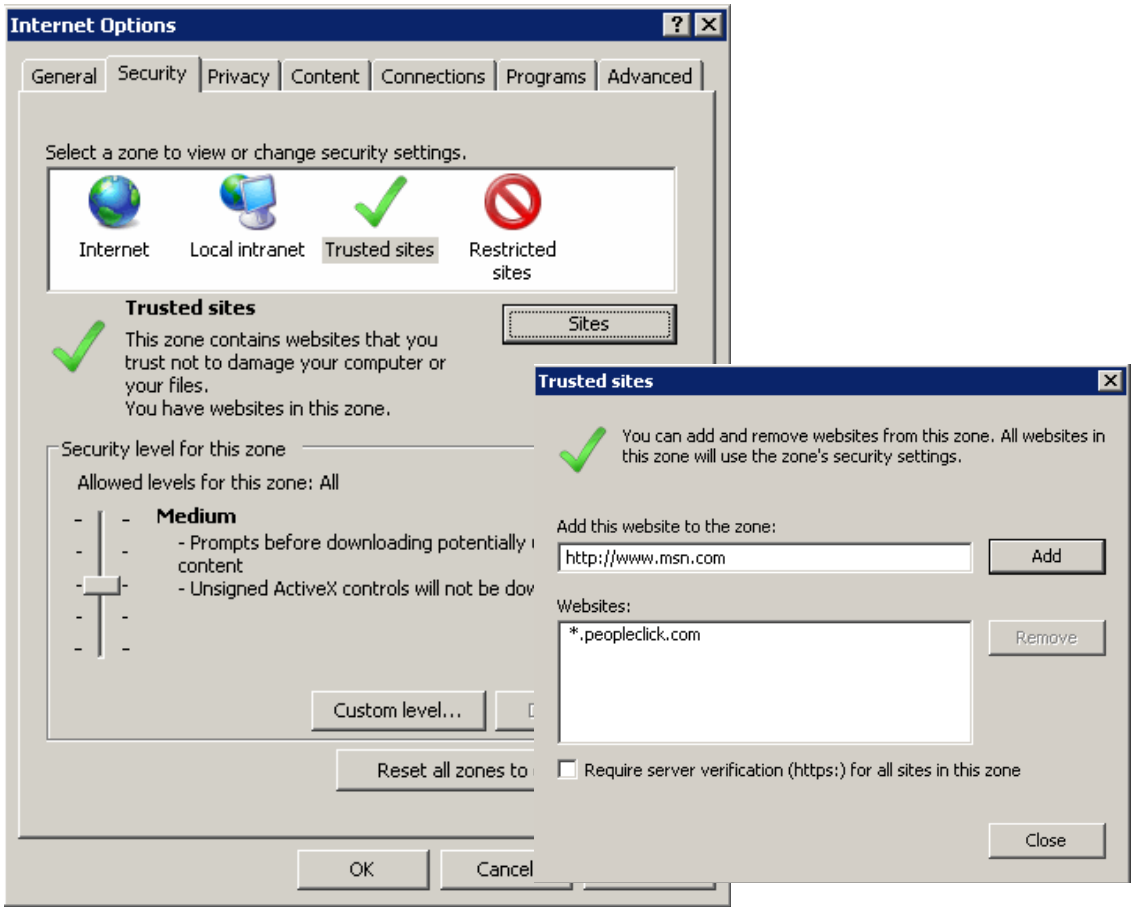
CONFIGURE INTERNET EXPLORER

When you have successfully downloaded Internet Explorer (if necessary), you must configure certain settings to ensure proper functions are available.

1. Open Internet Explorer

2. On the **Tools** menu, select **Internet Options**

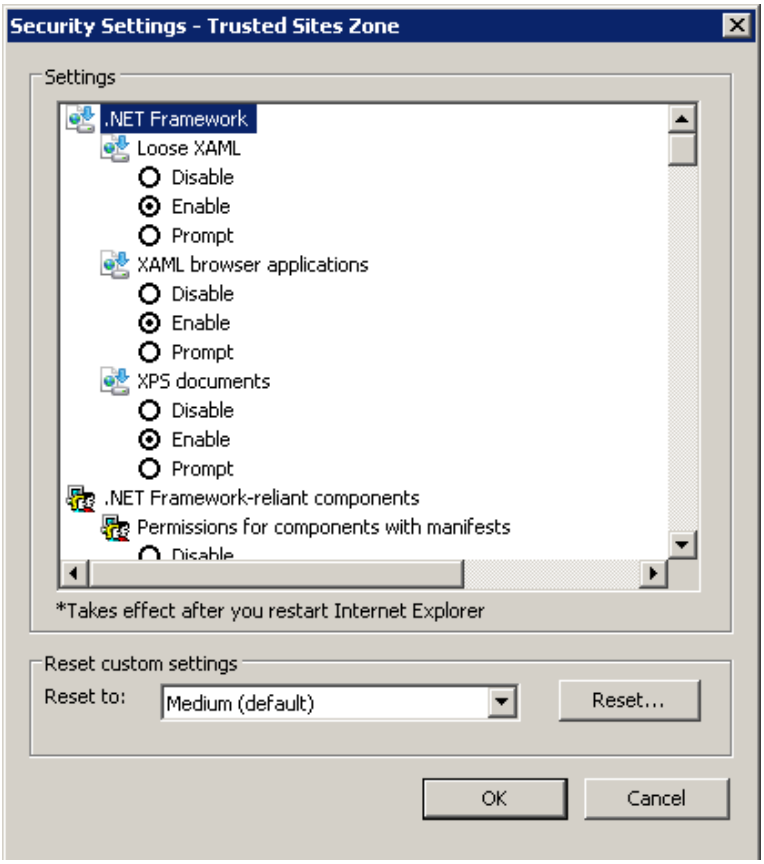
SET TRUSTED SITES:



3. Click the **Security** tab at the top of the Internet Options dialog box
4. Click the **Trusted Sites** icon
5. Click the **Sites** button
6. Unselect the **Require server verification (https:) for all sites in this zone** check box
7. Type ***.peopleclick.com** in the **Add this Web site to the zone** field and click the **Add** button
8. Click **Close** to return to the Security tab

CONFIGURE INTERNET EXPLORER (CONTINUED)

SET SECURITY SETTINGS:

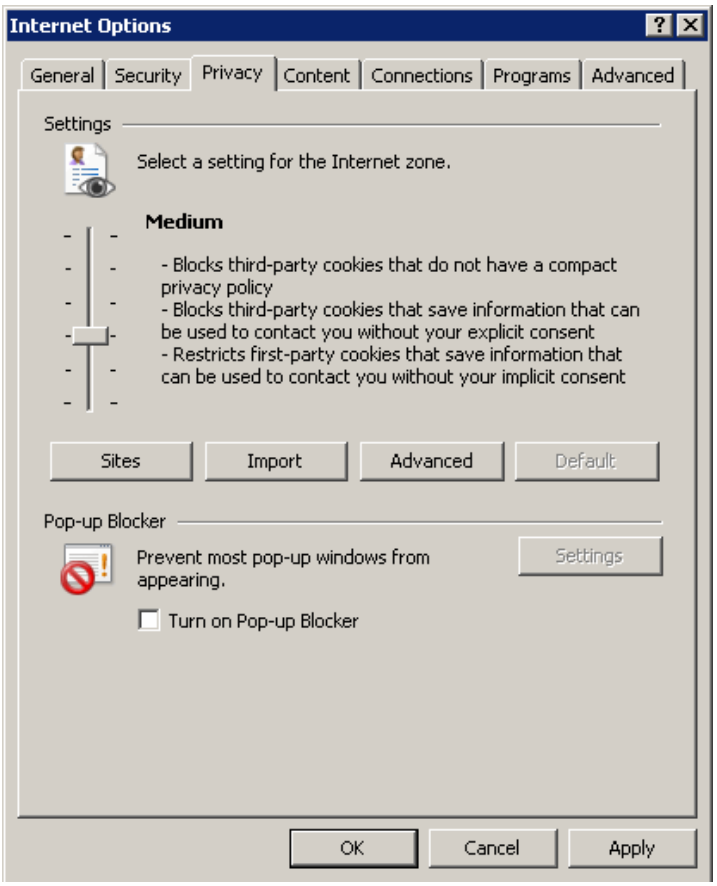


1. On the Security tab, click the **Custom level** button
2. Use the information in the table below to set the Security Settings that impact the Peopleclick RMS Recruiting Portal
3. Click **OK** to apply and save your changes

Setting Name	Required Value
Active X controls and plug-ins	
Run signed ActiveX controls	Enable
Script ActiveX controls marked safe for scripting	Enable
Downloads	
File Download	Enable (Required to view candidate and requisition attachments that are not viewed natively within the browser window.)
Miscellaneous	
Submit non-encrypted form data	Enable. (Required to support the Candidate Portal if not using HTTPS.)
Scripting	
Active Scripting	Enable. (Required to support the Candidate Portal and Business Intelligence Platform.)

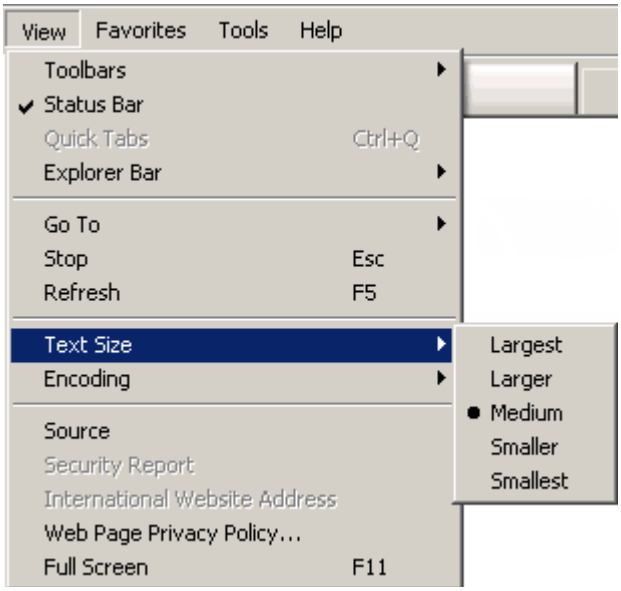
CONFIGURE INTERNET EXPLORER (CONTINUED)

SET PRIVACY SETTINGS:



1. Click the **Privacy** tab
2. Use the slider to set the privacy setting to **Medium**
3. Click **OK**.

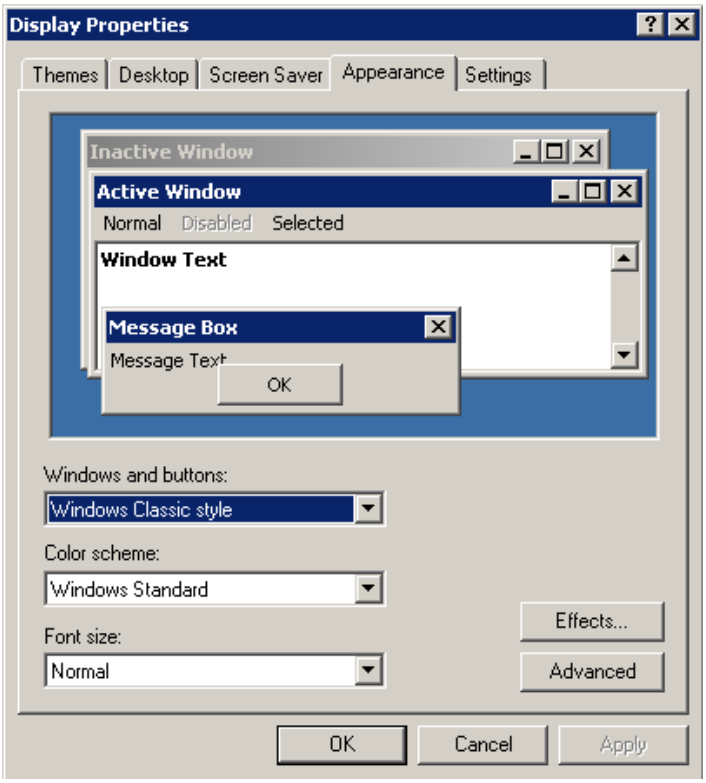
SET TEXT SIZE:



1. On the **View** menu, click **Text Size**
2. Select **Medium**, **Smaller**, or **Smallest**

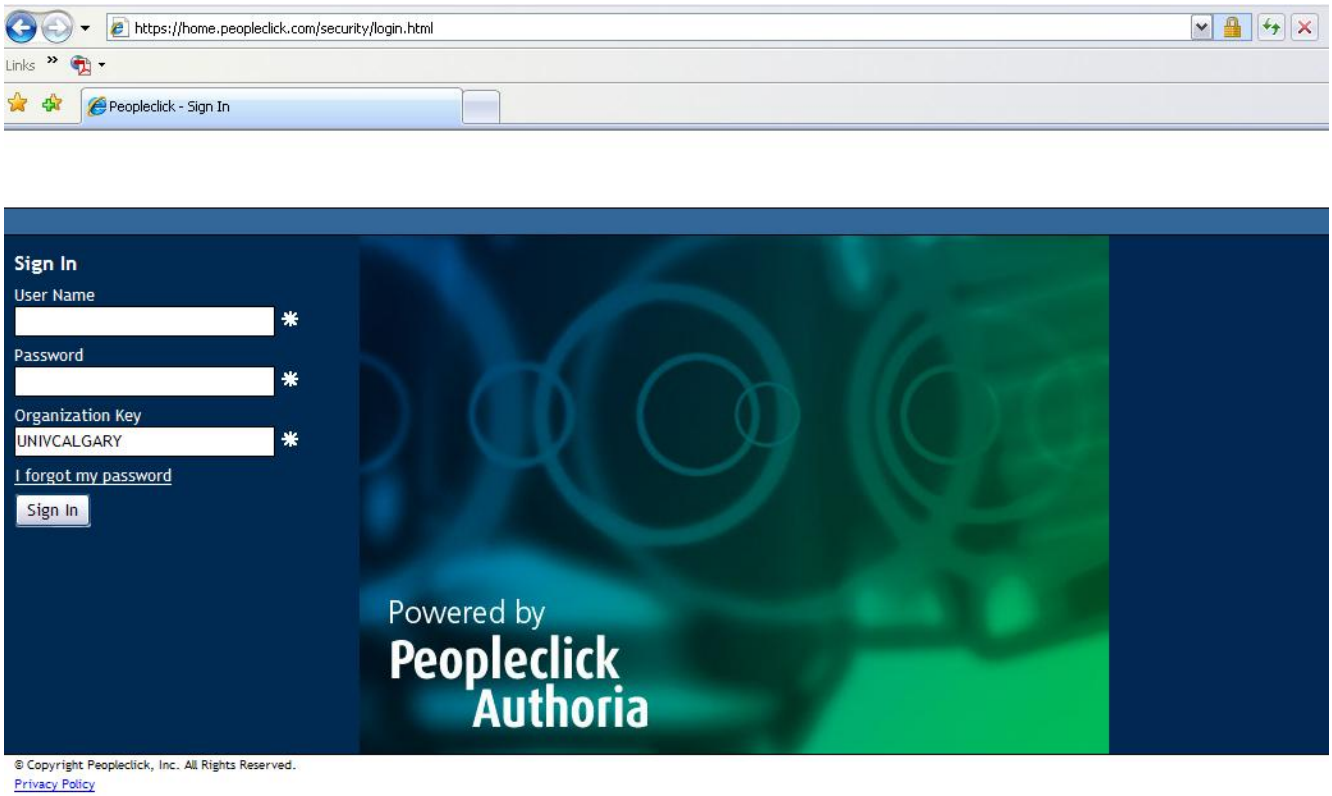
CONFIGURE DESKTOP SETTINGS

The Peopleclick RMS Recruiting Portal is best viewed when specific display settings are selected:



1. Right-click in your Windows Desktop
2. Select **Properties** from the pop-up menu
3. Click the **Appearance** tab
4. Select **Normal** in the **Font size** field
5. Click the **Settings** tab
6. Move the slider to set the display size to 1024X768
7. Click the **Advanced** button
8. On the **General** tab, select **Normal (96 DPI)** in the DPI Setting field and then click **OK**
9. Click **OK**.

SIGN IN TO PEOPLECLICK



STEPS

In Internet Explorer (version 7 or 8), enter the URL:
https://home.peopleclick.com/

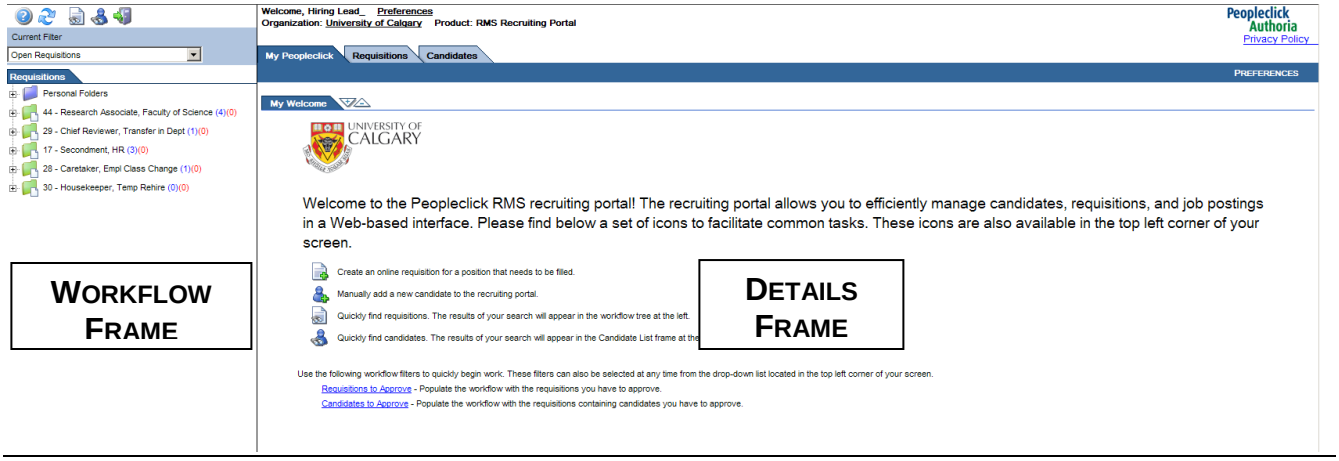
Enter your username, password and organization key (**UNIVCALGARY**).

> Your username and password will be provided to you by the Recruitment Team.
>
> If you are having problems logging in, please contact hrhire@ucalgary.ca.

NAVIGATING THE RECRUITING PORTAL

IDENTIFY SCREEN ELEMENTS IN THE RECRUITING PORTAL

Peopleclick has been designed to make your work easier and more efficient. The Recruiting Portal window is divided into two primary frames: the **Workflow** frame, located on the left, and the **Details** frame, located on the right.


Welcome, Hiring Lead_ Preferences
Organization: University of Calgary Product: RMS Recruiting Portal
Peopleclick Authoria
Privacy Policy
Current Filter
Open Requisitions
Requisitions
Personal Folders
44 - Research Associate, Faculty of Science (4)(0)
29 - Chief Reviewer, Transfer in Dept (1)(0)
17 - Secondment, HR (3)(0)
28 - Caretaker, Empl Class Change (1)(0)
30 - Housekeeper, Temp Rehire (0)(0)
My Peopleclick
Requisitions
Candidates
PREFERENCES
My Welcome
UNIVERSITY OF CALGARY
Welcome to the Peopleclick RMS recruiting portal! The recruiting portal allows you to efficiently manage candidates, requisitions, and job postings in a Web-based interface. Please find below a set of icons to facilitate common tasks. These icons are also available in the top left corner of your screen.
Create an online requisition for a position that needs to be filled.
Manually add a new candidate to the recruiting portal.
Quickly find requisitions. The results of your search will appear in the workflow tree at the left.
Quickly find candidates. The results of your search will appear in the Candidate List frame at the
Use the following workflow filters to quickly begin work. These filters can also be selected at any time from the drop-down list located in the top left corner of your screen.
Requisitions to Approve - Populate the workflow with the requisitions you have to approve.
Candidates to Approve - Populate the workflow with the requisitions containing candidates you have to approve.
WORKFLOW FRAME
DETAILS FRAME

Workflow Frame

The Workflow frame displays your existing requisitions (jobs) in a folder format. These **requisition** folders contain detailed information about each requisition. Within each requisition folder, a series of **workflow** folders match your hiring process.

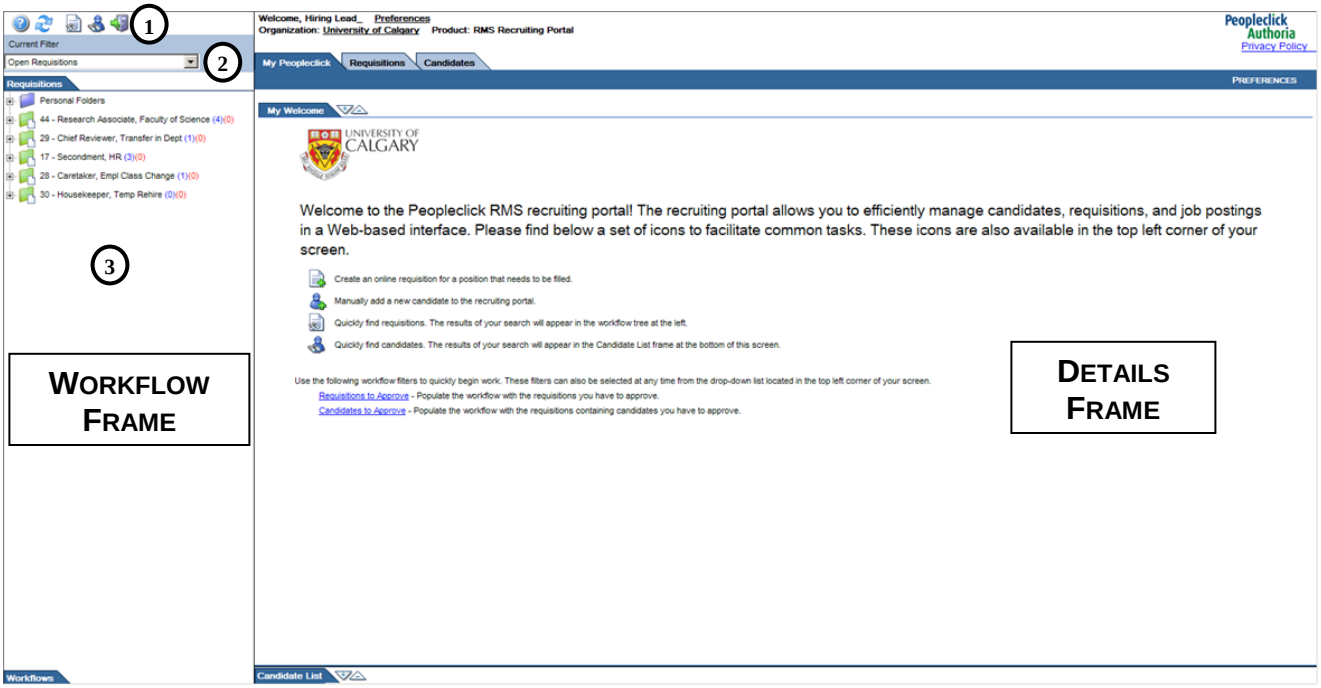
Candidates appear in the Sent to Manager folder and can be moved through the workflow folders as they are evaluated and a hiring decision is made.

Details Frame

The Details frame displays the information needed to review and approve requisitions as well as maintain detailed information about requisitions and candidates.

The Details frame displays three main tabs at the top of the frame. Page labels are located directly beneath the main tabs, and information panels are displayed within these pages. Use the tabs, pages, and panels of the Details frame to complete your day-to-day approval functions.

Recruiting Portal Screen Elements


1
2
3
Current Filter
Open Requisitions
Requisitions
Personal Folders
44 - Research Associate, Faculty of Science (4)(0)
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Workflows
WORKFLOW FRAME
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DETAILS FRAME
Candidate List

Workflow Frame. The left side of the window displays requisitions. Within each requisition, workflow folders and candidates are displayed.

1. **Global Icons Toolbar.** The Global toolbar is visible regardless of which main tab is selected in the Details Frame.

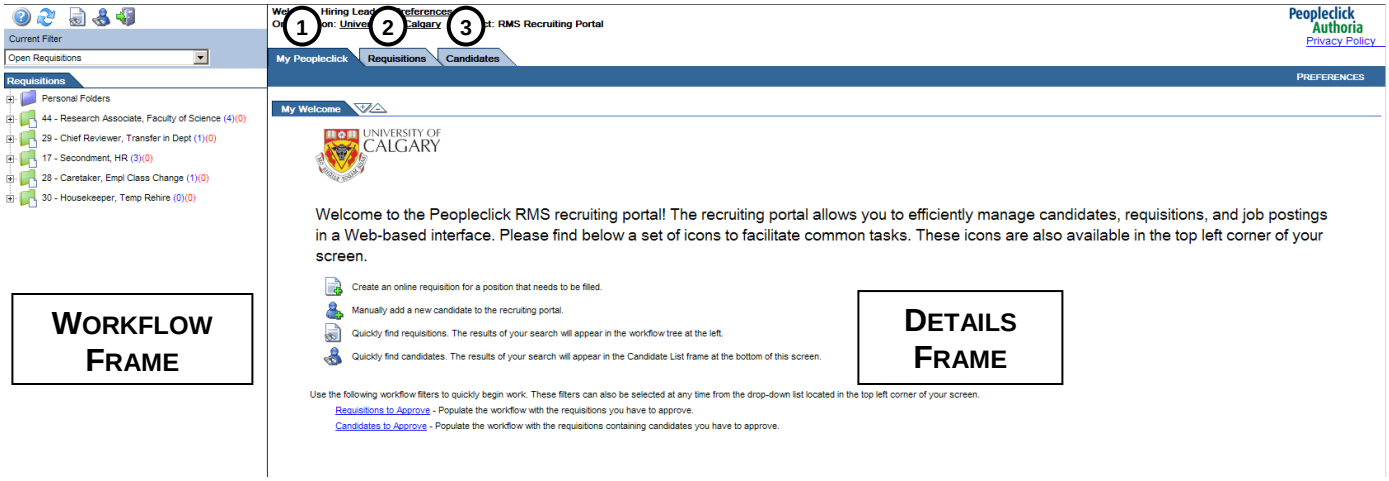
2. **Requisition Filter.** Requisition filters are used to manage the list of requisitions that is displayed in the Workflow frame. For example, you can use filters to display only requisitions that you need to approve (*Requisitions to Approve*), or only those requisitions that fall under a specific status (*Open / Pending / On Hold*).

3. **Requisitions View.** The requisitions view displays a list of requisitions that you have permission to view. The currently selected requisition filter determines which requisitions are shown. To display the requisitions view, click the **Requisitions** tab in the Workflow frame.

Recruiting Portal Screen Elements (continued)

Details Frame. The right side of the window displays the Recruiting Portal main tabs:

1. The **My Peopleclick** tab is used to configure the Recruiting Portal so you can easily access the items you need in your daily job duties, such as viewing requisition, candidate, and job posting summaries.
2. The **Requisitions** tab is used to view information about your current requisitions, and add, view, and delete notes and attachments associated with requisitions. Click on a job title in the Workflow frame to view the requisition in the Details Frame.
3. The **Candidates** tab is used to view information about current candidates and add notes and attachments to a candidate's profile. Click on the Candidates name to view the Candidate in the Details Frame.


1
2
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Current Filter
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44 - Research Associate, Faculty of Science (4)(0)
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Calgary
RMS Recruiting Portal
Peopleclick Authoria
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My Welcome
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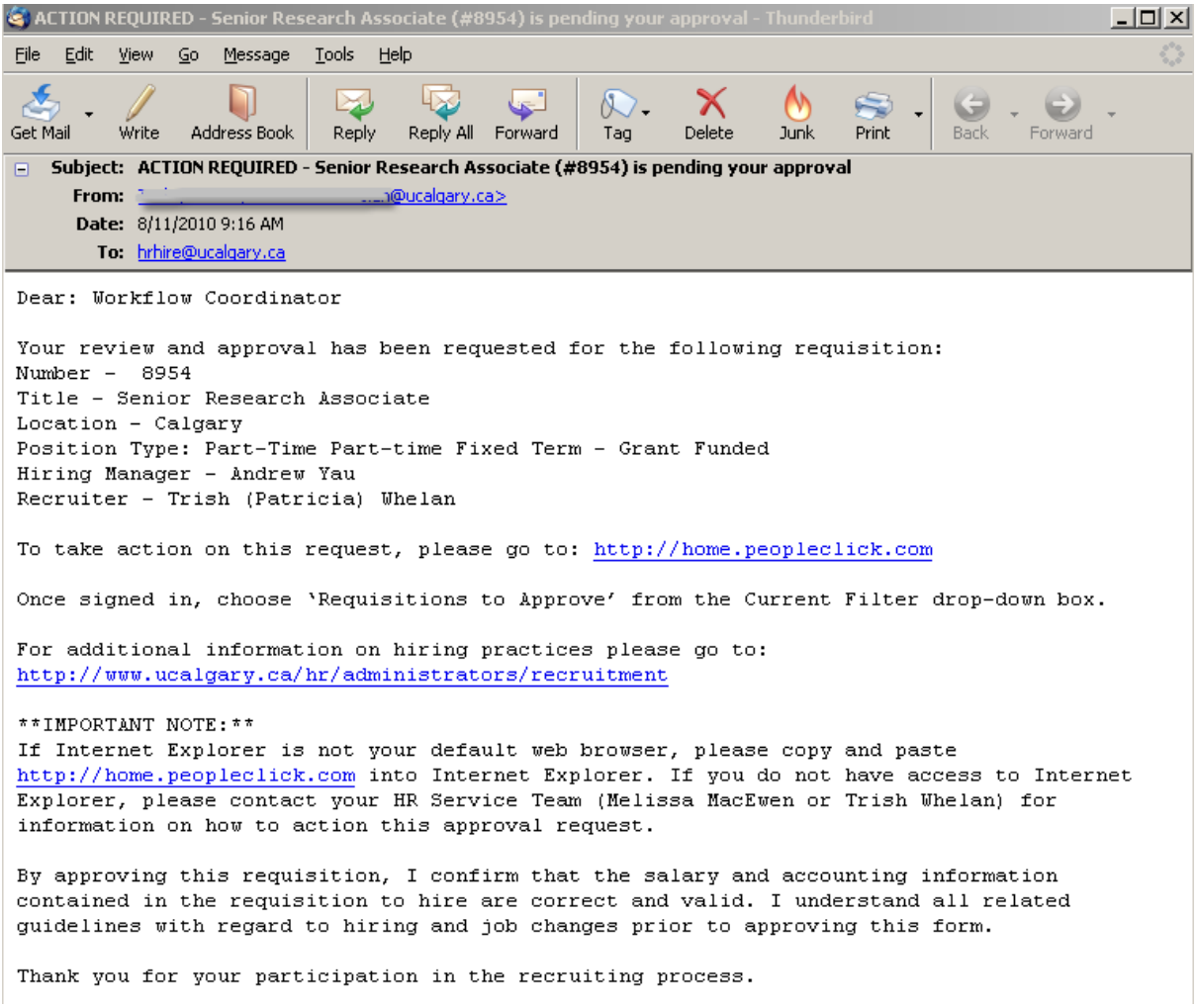
WORKFLOW FRAME
DETAILS FRAME

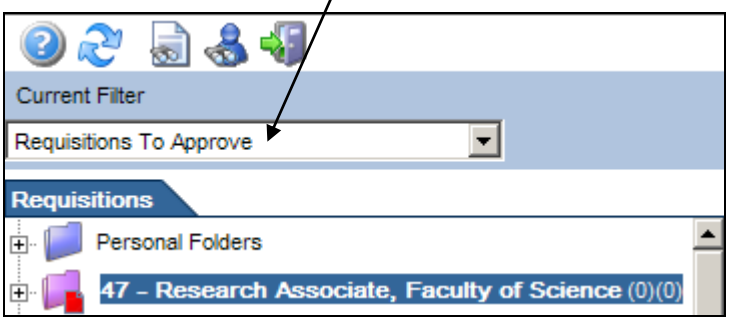
REVIEW AND APPROVE / REJECT A REQUISITION

HOW TO REVIEW A REQUISITION

When your approval is required, you will receive an email as indicated below:


ACTION REQUIRED - Senior Research Associate (#8954) is pending your approval - Thunderbird
File Edit View Go Message Tools Help
Get Mail Write Address Book Reply Reply All Forward Tag Delete Junk Print Back Forward
Subject: ACTION REQUIRED - Senior Research Associate (#8954) is pending your approval
From: @ucalgary.ca>
Date: 8/11/2010 9:16 AM
To: hrhire@ucalgary.ca
Dear: Workflow Coordinator
Your review and approval has been requested for the following requisition:
Number - 8954
Title - Senior Research Associate
Location - Calgary
Position Type: Part-Time Part-time Fixed Term - Grant Funded
Hiring Manager - Andrew Yau
Recruiter - Trish (Patricia) Whelan
To take action on this request, please go to: http://home.peopleclick.com
Once signed in, choose 'Requisitions to Approve' from the Current Filter drop-down box.
For additional information on hiring practices please go to:
http://www.ucalgary.ca/hr/administrators/recruitment
IMPORTANT NOTE:
If Internet Explorer is not your default web browser, please copy and paste
http://home.peopleclick.com into Internet Explorer. If you do not have access to Internet
Explorer, please contact your HR Service Team (Melissa MacEwen or Trish Whelan) for
information on how to action this approval request.
By approving this requisition, I confirm that the salary and accounting information
contained in the requisition to hire are correct and valid. I understand all related
guidelines with regard to hiring and job changes prior to approving this form.
Thank you for your participation in the recruiting process.

1. Requisitions that require review and approval will appear in the workflow tree under filter **Requisitions to Approve** and will be in 'Pending' status which is denoted by the purple folder

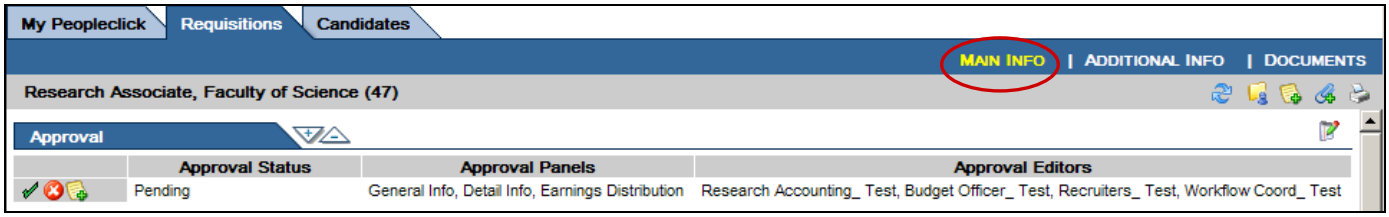


2. In the workflow tree, click the title of the requisition you want to review. The requisition information will appear in the Details Frame on the right side of the screen.

Requisition information is divided into three separate pages:

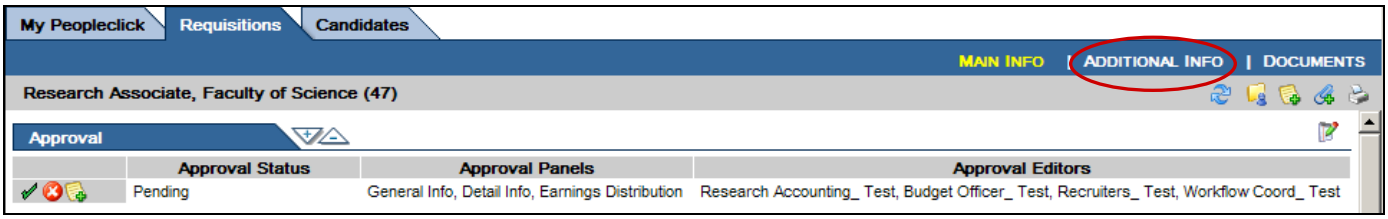
- **Main Info**
- **Additional Info**
- **Documents**

3. Begin with the **Main Info** page which contains the following sections:
   - **Approval** - Lists the individuals in the approval workflow and shows date/time stamp
   - **General Info** - Includes the position title, number of positions and expected start and end dates
   - **Detail Info** - Includes all position details including position type, faculty/department, work hours, job code, position description, etc.
   - **Contact**s – Lists the contacts connected to the requisition (i.e. those individuals who have access to view the requisition and the associated candidates)

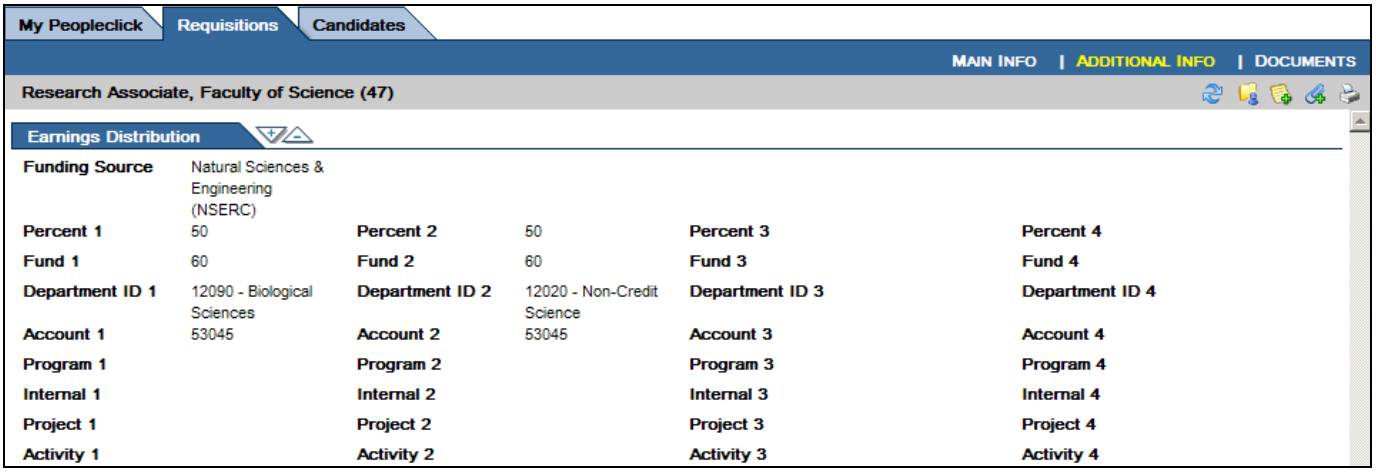


Scroll down to view the panels you should review prior to approving or rejecting the requisition.

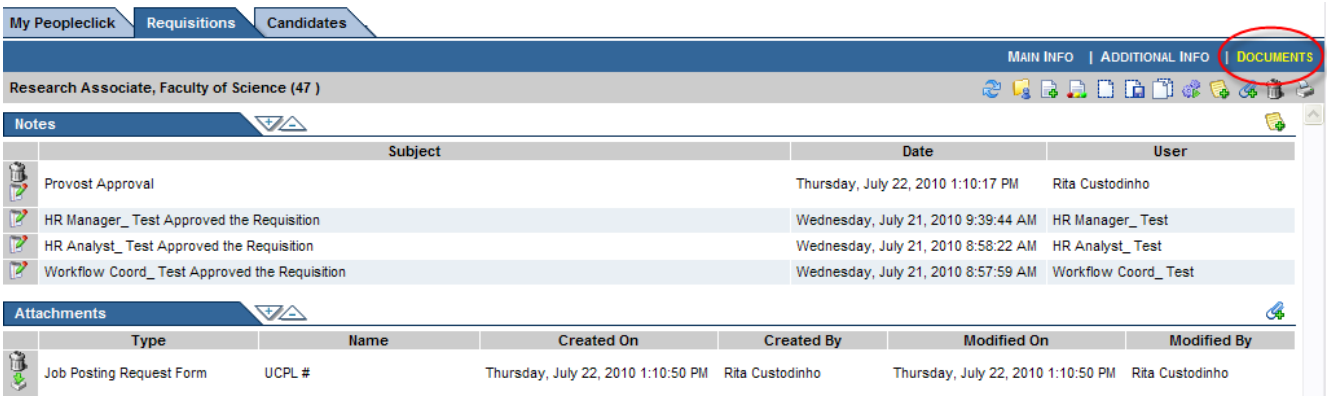
4. To review **Earnings Distribution**, navigate to **Additional Info:**



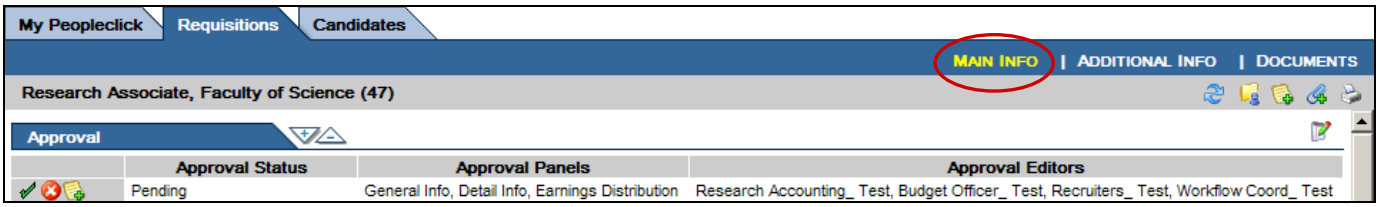
- The **Earnings Distribution** provides applicable accounting details:



5. To view the Posting Request form or other Notes/Attachments, navigate to **Documents**

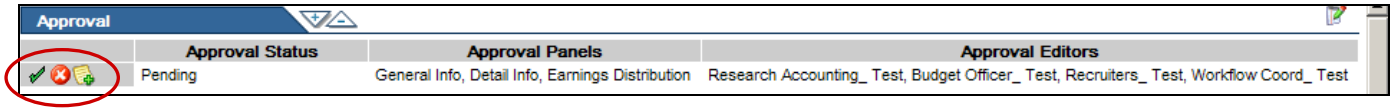


6. To return to the **Main Info** page, click the link:



How to Review a Requisition (Continued)

7. After reviewing the information, return to the **Approval** panel and take one of the following actions:



- Click the **Approve** icon to approve the requisition
- Click the **Reject** icon to deny the requisition. If you deny the requisition, it will be sent back to the HR Service Team for review
- Click the **Add New Note** icon to attach a note to the requisition

IMPORTANT NOTE: Once you action on an approval, you **do not** have the ability to change / modify your decision. In fact, once you have actioned a request, most approvers will no longer have access to view the requisition in Peopleclick, so approve/deny carefully!

8. Logout of Peopleclick

What to Expect if a Requisition is Denied / Rejected

If at any point in the approval process an approver rejects / denies the requisition, the HR Services Team Contact (Primary Recruiter in Peopleclick) will receive an email notification.

Subject: **Test Recruitment, Test CL (#8484) approval status has changed to Rejected**
From: HR Manager_ Test
Date: 3:51 PM
To: work@ucalgary.ca

Please be advised that the approval status has changed to "Rejected" for the following requisition:

Number - 8484
Title - Test Recruitment, Test CL
Faculty - VP (Finance & Services)
Department - 65003 - Recruit & Resource (Non-Acad)
Position Type - Full-Time Regular
Hiring Manager - Gail Daniels_
Recruiter - HR Manager_ Test

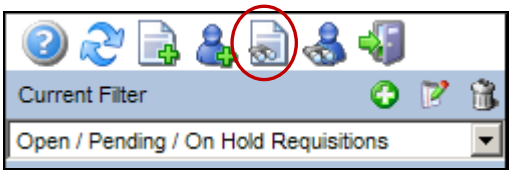
If the approval status is 'Denied', please contact your recruiter or hrhire@ucalgary.ca.

If it's necessary to take action on this notification, you can access the recruitment management system by clicking on the link below.
https://home.peopleclick.com/

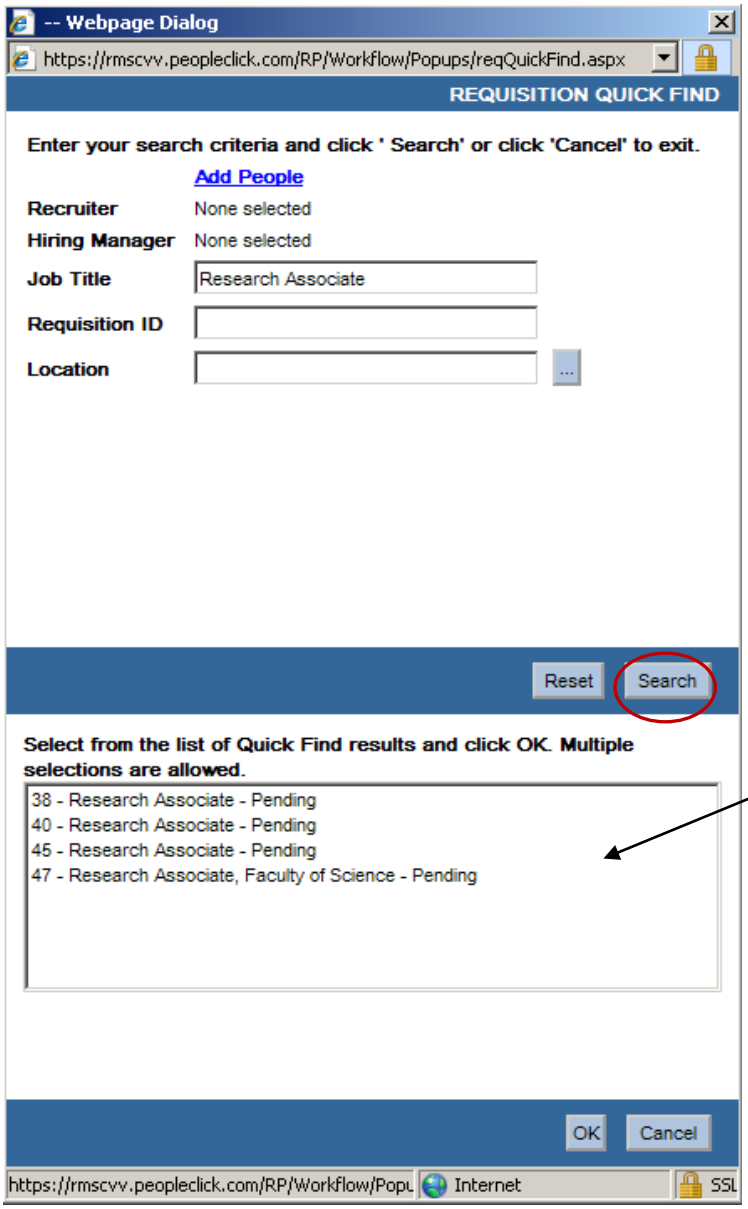
Thank you for your participation in the recruiting process.

The HR Services Team contact will make the necessary changes and resubmit the requisition for approval.

SEARCH FOR A REQUISITION IN PEOPLECLICK



Use the **Find Requisition** ( ) icon to search for a specific requisition.

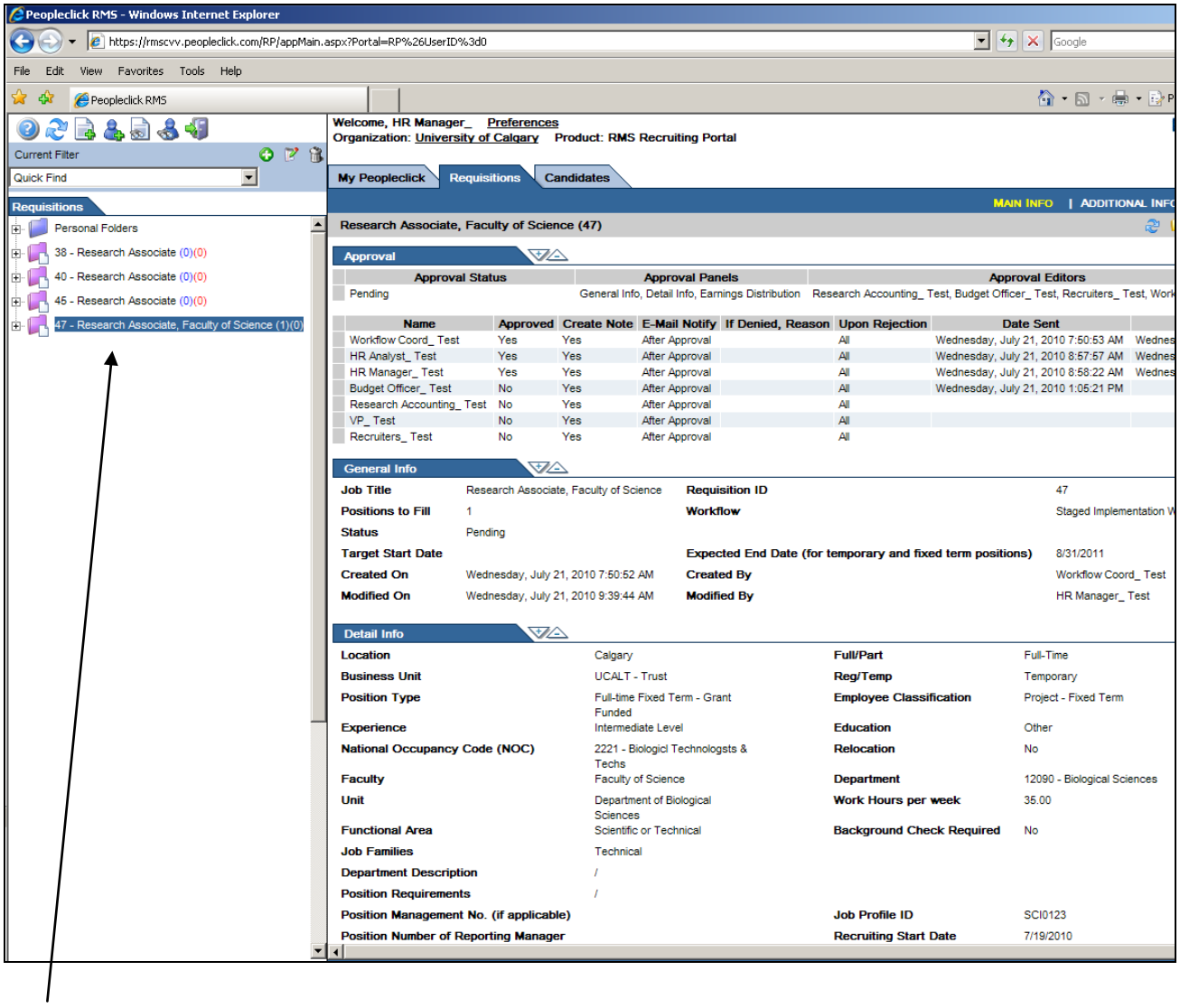


A search box will appear and you can search by Job Title, Requisition ID or Recruiter / Hiring Manager.

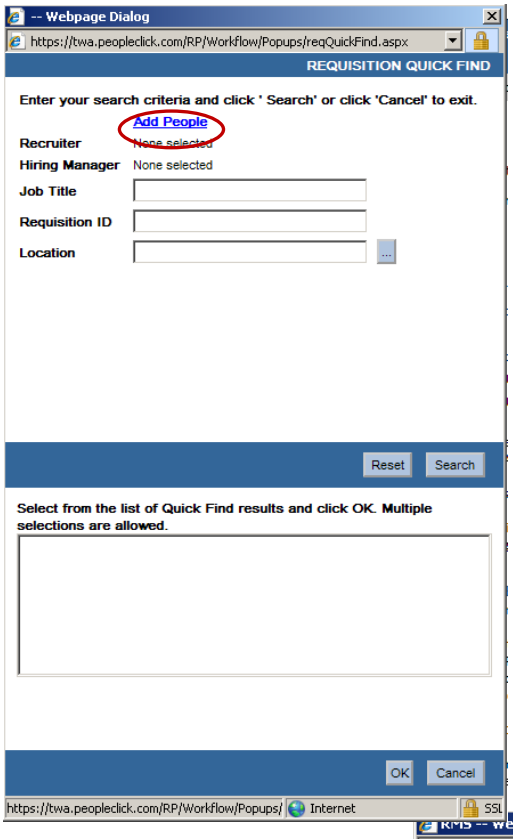
After entering search criteria, click Search.

Matches display in the box below. Select one or more requisitions from the list and click OK (more than one selection can be made using the 'Ctrl' key).

SEARCH FOR A REQUISITION (CONTINUED)



Selected requisitions will appear in the Workflow Frame.

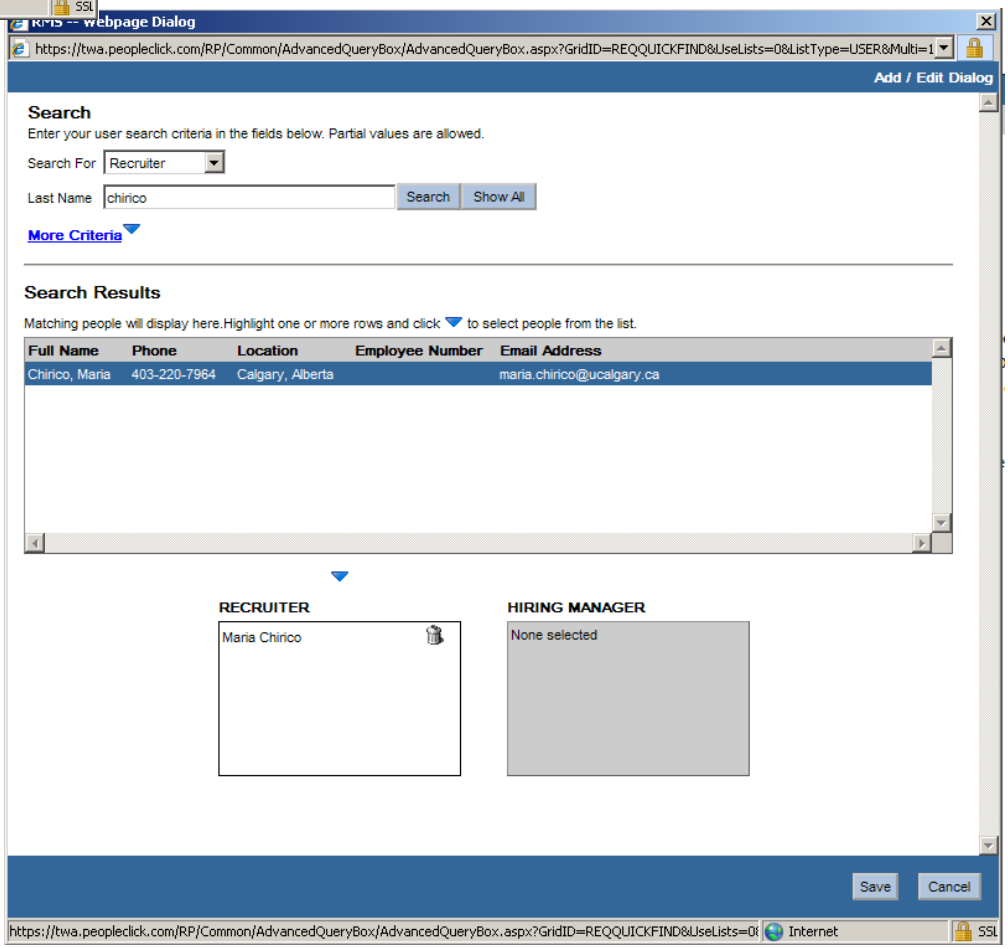


Search by Recruiter / Hiring Manager

To search by Recruiter or Hiring Manager, click on the **Add People** link, and the search window displayed below will appear.

Select "Recruiter" or "Hiring Manager" in the **Search For** drop down menu.

Enter the *Last Name* of the person you are searching for and click Search. Matches will appear in the **Search Results** section.



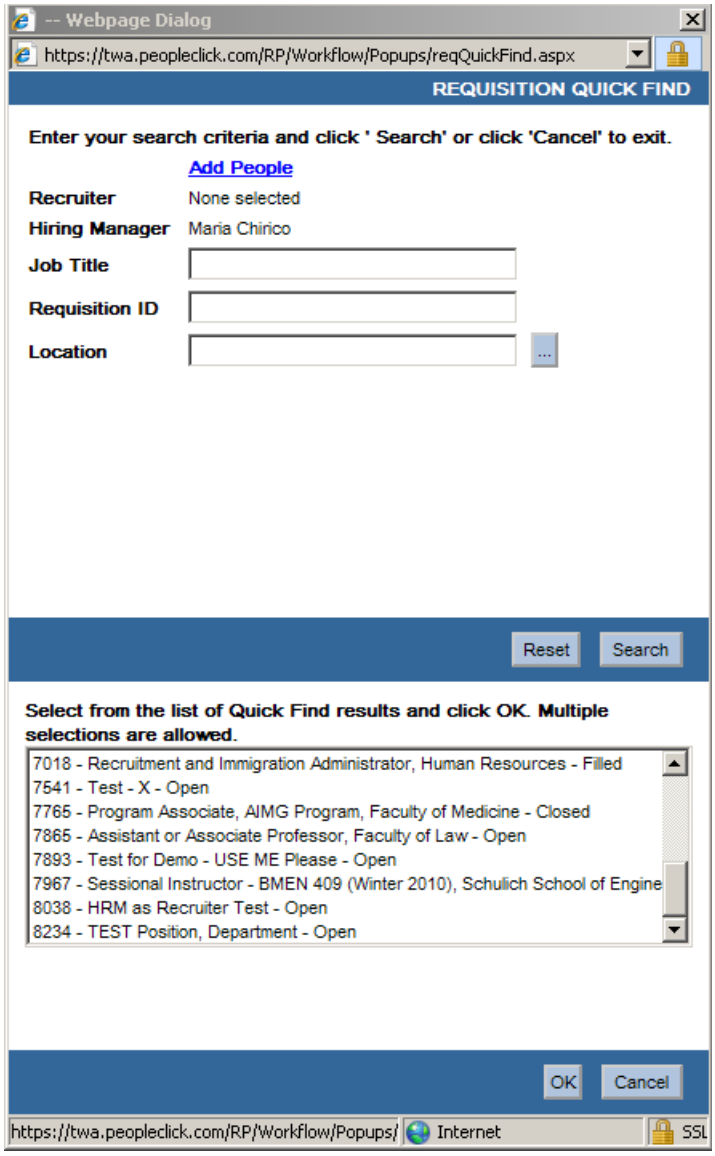
To select and add the desired **Recruiter** or **Hiring Manager** to the appropriate box, double-click on the name in the Search Results list or highlight the name and click the ▼ arrow.

To remove a name from a box, click the 🗑 icon next to the name you want to remove.

Repeat the above steps to select additional Recruiters and / or Hiring Managers.

Click Save when done and the names you have selected will appear in the Requisition Quick Find box.

SEARCH FOR A REQUISITION (CONTINUED)


-- Webpage Dialog
https://twa.peopleclick.com/RP/Workflow/Popups/reqQuickFind.aspx
REQUISITION QUICK FIND
Enter your search criteria and click ' Search' or click 'Cancel' to exit.
Add People
Recruiter
None selected
Hiring Manager
Maria Chirico
Job Title
Requisition ID
Location
Reset
Search
Select from the list of Quick Find results and click OK. Multiple selections are allowed.
7018 - Recruitment and Immigration Administrator, Human Resources - Filled
7541 - Test - X - Open
7765 - Program Associate, AIMG Program, Faculty of Medicine - Closed
7865 - Assistant or Associate Professor, Faculty of Law - Open
7893 - Test for Demo - USE ME Please - Open
7967 - Sessional Instructor - BMEN 409 (Winter 2010), Schulich School of Engine
8038 - HRM as Recruiter Test - Open
8234 - TEST Position, Department - Open
OK
Cancel
https://twa.peopleclick.com/RP/Workflow/Popups/
Internet
SSL

The name(s) you have selected will appear in the Requisition Quick Find box.

After entering any additional search criteria, click Search.

Matches display in the box below. Select one or more requisitions from the list and click OK (more than one selection can be made using the 'Ctrl' key).

Selected requisitions will appear in the Workflow Frame.